

## **GWMG FIRM OVERVIEW**

### **Our mission, our guide**

Our guiding principle is at the heart of every strategy we build, every plan we manage and every solution we deliver. We understand that you have unique goals, and we must employ a viable, customized strategy to help you reach your financial success.

### **Benefits to being a GWMG client**

As a GWMG client, you will benefit from a time tested investment philosophy based on the integrity our clients have come to expect from a trusted wealth management firm. Focused solely on your specific goals, we conduct our planning practices with an emphasis on meeting your desired outcome. Our planning process includes continuous client communication, an important ingredient that contributes heavily to our success. Your GWMG representative is your lifelong financial partner and an expert in the industry.

### **Our guiding principles:**

We believe that each client is unique and deserves a tailored financial plan to meet the client's goals.

We manage risk, so you don't have to.

We focus on increasing the money you invest after tax returns.

We are advocates of long-term investment planning.

### **Our practices:**

Each plan is crafted individually.

Our financial advisors will tailor investment ideas with a list of alternatives, providing recommendations based on your goals, desired returns and comfort level of risk.

We are measured on performance, not transaction volume. We succeed only if you do.

Unlike many firms, we do not succeed unless you do. Our "shared success" value ensures that we will work to secure the smartest transaction for you and always look for ways to grow your portfolio.

We are solely focused on your investment strategy and asset management. As your partner, GWMG insists on serving you personally. That way, we can get to know you and invest more wisely on your behalf.

**Our process:**

Your simple steps to long-term financial success:

**1. Organize**

Discuss your long-term goals, expectations and concerns with your advisor. We are here to help you review your investment strategy and asset growth, as well as evaluate your current holdings.

**2. Understand**

Design a financial roadmap with your financial advisor that aligns your financial direction with your expected outcome. Develop your plan and let us put it to the test.

**3. Control**

You've developed a plan and agreed to it. Now you need an advisor to manage it daily. Tell us where you want to go, and let us do the walking. You can trust that your portfolio is on good hands.

**4. Grow**

Each quarter we will sit down with you, look at your portfolio and make needed adjustments to help keep you on track to meeting your financial goals. We listen because we want you to succeed.

**The GRAnderson Wealth Management way**

With GRAnderson, you will benefit from having a long-term financial partner with a vast knowledge base and the resources to leverage the best financial plan tailored specifically for you.

The GRAnderson Wealth Management Group is as savvy, effective and proven as any you will find in the financial services industry. At GRAnderson, your goals are unique.

Let us walk with you on your road to achieving them.